

Issue: Setting an Inspection

1. The claim needs to be documented prior to setting and inspection. Ensure the following are completed before sending inspection.
 - a. 3 C properly documented. Confirm with repair facility that the cause of failure is identified and visible or demonstratable.
 - b. Review and verify any past claims related to the current claim. Document in the notes.
 - c. Ensure diagnostic templates are completed and saved in the claim notes.
 - d. Check for any relative TSBs or Recalls.
 - e. Estimate must be received and keyed into the claim and verified.
 - f. Customer statement on file
2. Inspections should only be set to confirm the reported failure. Inspections should only be set if none of the below apply or cannot be quickly obtained:
 - a. Repair Facility submitted photos
 - b. Failure confirmation via testing i.e.: alternator voltage test, pressure tests, etc.
3. At this time, you will need to post your verification note. To do so select the **[Add Notes]** button located under the **Actions** tab
4. Select Inspection verification note and enter the reasoning why you are sending inspection or if any of the above where done why there is no need for inspection.
5. Once you've confirmed the previous steps have been completed inspection is ready to be set
6. Go to **Action Tabs** and select order inspection.
7. Now be taken to the Order Inspection screen. Ensure you confirm the repair facility email address.
8. Next, determine if you will need fluid analysis done during the inspection. If needed select YES
9. In the **[Inspection Reason]** field, ensure you document clearly and concisely exactly what you want the inspector to document.
10. If needed, document any special requests in the corresponding **[Special Request]** field. If there are no special requests, leave this field blank.
11. At this time, you're ready to set your inspection. Do so by selecting the **[Send Inspection]** button found in the bottom, right corner
12. This will generate an email and send it to Southwest Inspections (SWIS). At this time, you will see the confirmation that the inspection was sent.
13. You can check the inspection by opening the [Related] tab of the claim. Scroll down to the **[Inspection Items]** portion. You will see the status for the Inspection as **"Ordered"**
14. Upon receipt of a completed inspection, the inspection will be listed within the Inspection Received panel
15. Select the Inspection ID number to view inspection at this time, you can review your inspection to document the information needed.
16. Now you'll need to generate a review note, Select **[Inspection Review]** from the dropdown on the right and write your review in the note field.
17. To finalize, you'll need to mark your inspection as reviewed. Select the **[Mark Inspection Reviewed]** button on the **[Order Inspection]** screen.
18. Afterwards, your inspection will reflect as reviewed on the claim front screen

Purpose

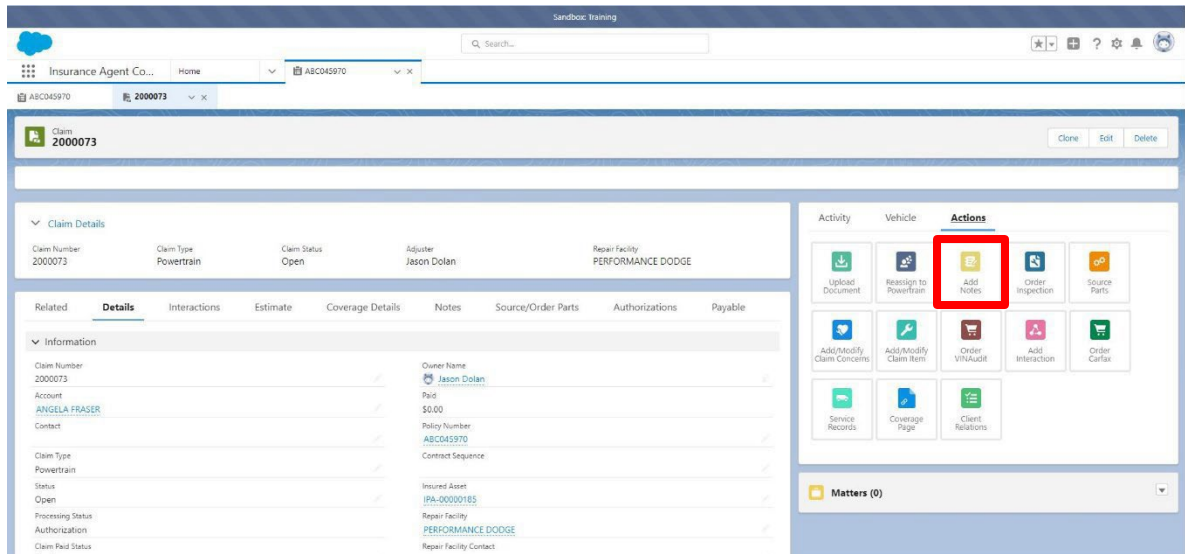
This SOP is intended to outline the process for setting and reviewing an inspection.

Teams Impacted

- Small Claims
- General Claims
- Technical Claims

Procedure

1. AmericanAuto Shield (AAS) requires that claims be documented prior to setting an inspection. Before scheduling an inspection ensure the following are complete:
 - a. 3C's properly documented and saved for each failure reported.
 - b. Review and verify any past claims related to the current claim. Document in the notes.
 - c. Ensure diagnostic templates are completed and saved in the claim notes.
 - d. Check for any relative TSBs or Recalls and document in the claim notes.
 - e. Inspections are NOT to be set without an estimate received and keyed into the claim.
 - f. Service records (if applicable) should be received and reviewed.
 - g. Customer statement on file (if applicable)
 - h. Confirm with repair facility that cause of failure is identified and visible or demonstratable.
 - i. Be sure to identify the need for records prior to setting an inspection. In some cases, records may prove pre-existing, lack of maintenance, etc. In these events, the records alone may complete the claim.
2. Inspections should only be set to confirm the reported failure. Keep in mind, there are multiple ways to accomplish this. Inspections should only be set if none of the below apply or cannot be quickly obtained:
 - a. Repair Facility submitted photos
 - b. Failure confirmation via testing i.e.: alternator voltage test, pressure tests, etc.
3. At this time, you will need to post your verification note. To do so select the **[Add Notes]** button located under the *Actions* tab.

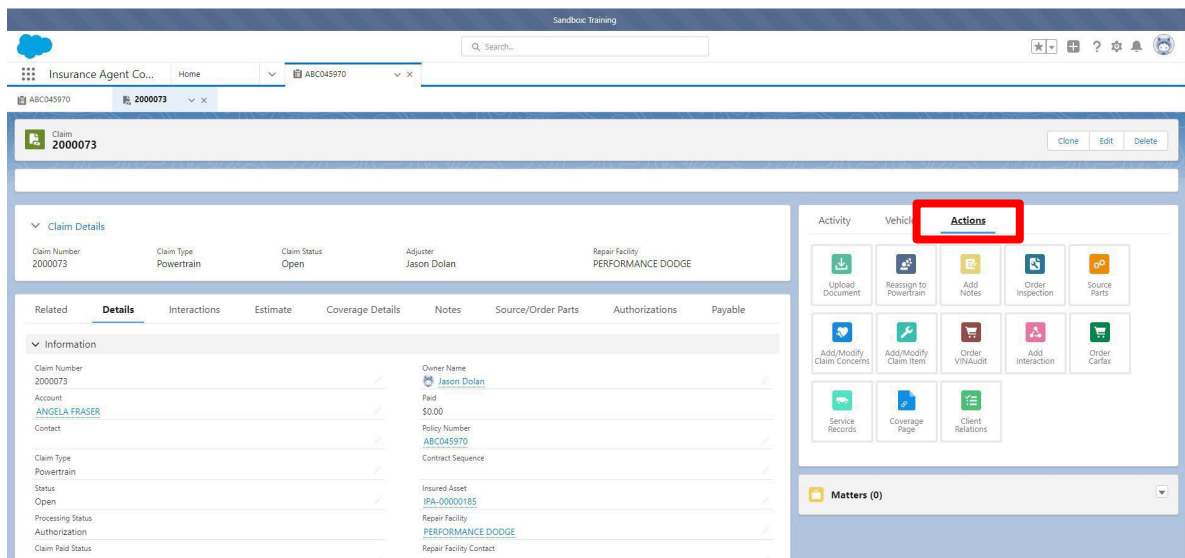


The screenshot displays the AAS web application interface. At the top, there's a navigation bar with 'Insurance Agent Co...' and a search bar. Below this, a breadcrumb trail shows 'ABC045970' and '2000073'. The main content area is titled 'Claim 2000073' and includes a 'Clone Edit Delete' menu. The 'Claim Details' section shows 'Claim Number: 2000073', 'Claim Type: Powertrain', 'Claim Status: Open', 'Adjuster: Jason Dolan', and 'Repair Facility: PERFORMANCE DODGE'. The 'Related' section has tabs for 'Details', 'Interactions', 'Estimate', 'Coverage Details', 'Notes', 'Source/Order Parts', 'Authorizations', and 'Payable'. The 'Details' tab is active, showing a table with fields like 'Claim Number', 'Account', 'Contact', 'Claim Type', 'Status', 'Processing Status', 'Authorization', 'Claim Paid Status', and 'Revolutions'. The 'Actions' tab is also visible, containing buttons for 'Upload Document', 'Reassign to Powertrain', 'Add Notes' (highlighted with a red box), 'Order Inspection', 'Source Parts', 'Add/Modify Claim Concerns', 'Add/Modify Claim Item', 'Order VIN Audit', 'Add Interaction', 'Order Carfax', 'Service Records', 'Coverage Page', and 'Client Relations'. At the bottom, there's a 'Matters (0)' section.

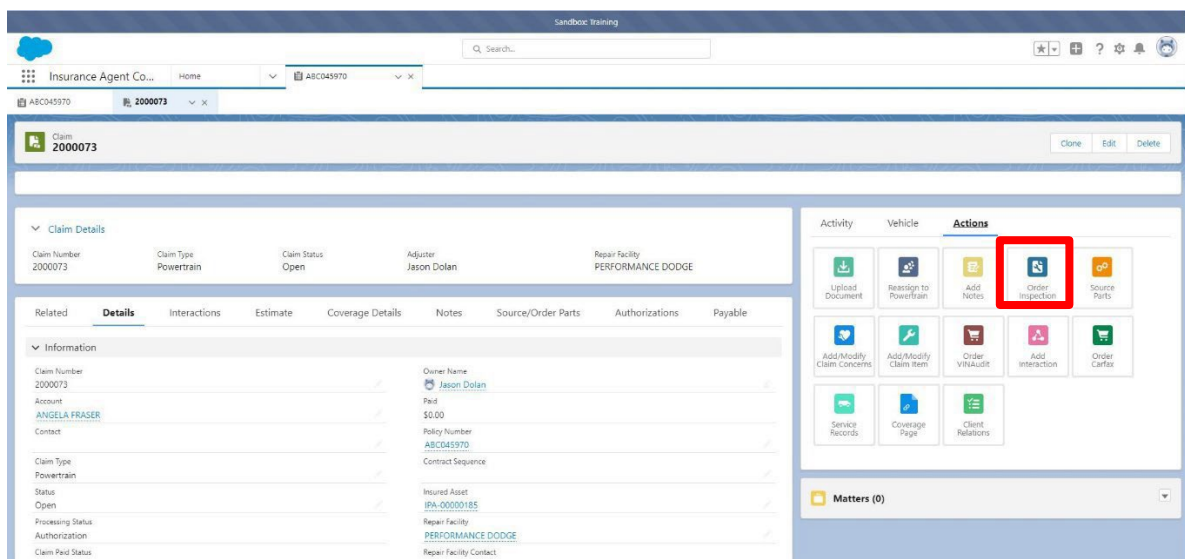
- From the drop-down list, select **[Verification Note]**. In the field to the right, enter your reasoning as to why you are not setting an inspection. Once completed select **[Next]**. If you are sending an inspection no verification note is needed.



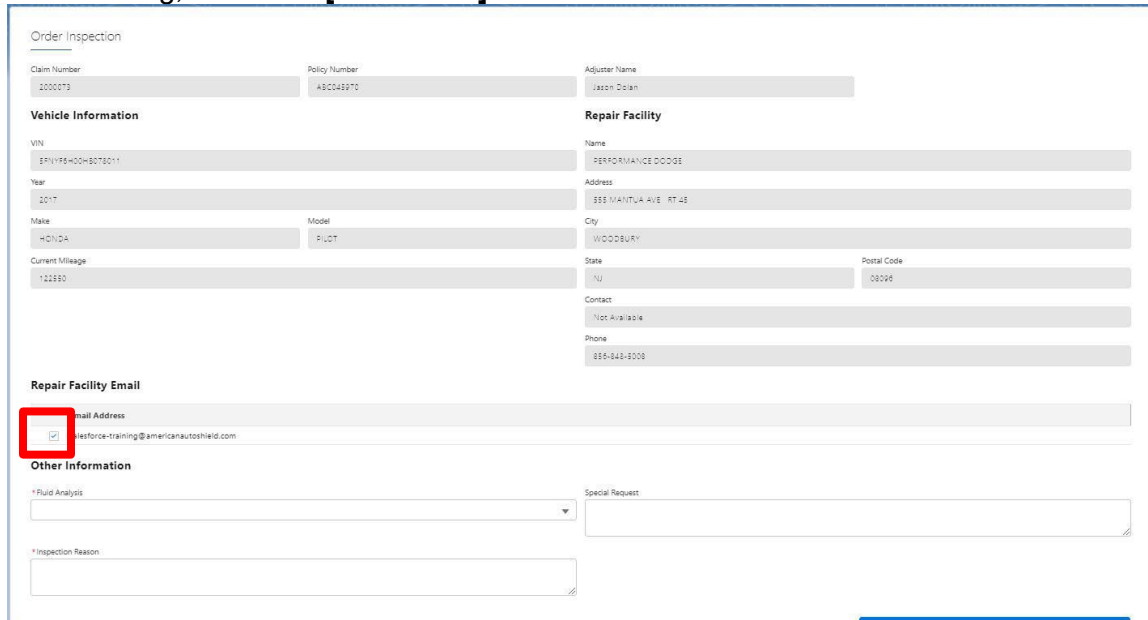
- Once you've confirmed the previous steps have been completed and are ready to set an inspection, begin by selecting the **[Actions]** tab to the right of your claim screen



- This will bring up the Actions menu. At this time select **[Order inspection]**.



7. You will now be taken to the Order Inspection screen. Ensure you confirm the repair facility email address. If matching, select the **[check box]** found next to the email address.



Order Inspection

Claim Number: 0000073 Policy Number: ABC045970 Adjuster Name: Jason Dolan

Vehicle Information

VIN: 8P1Y1P8H00W0070011 Year: 2017 Make: HONDA Model: PILOT Current Mileage: 122880

Repair Facility

Name: PERFORMANCE DODGE Address: 888 MAIN ST AVE RT 48 City: WOODBURY State: NJ Postal Code: 08096 Contact: Not Available Phone: 855-848-8008

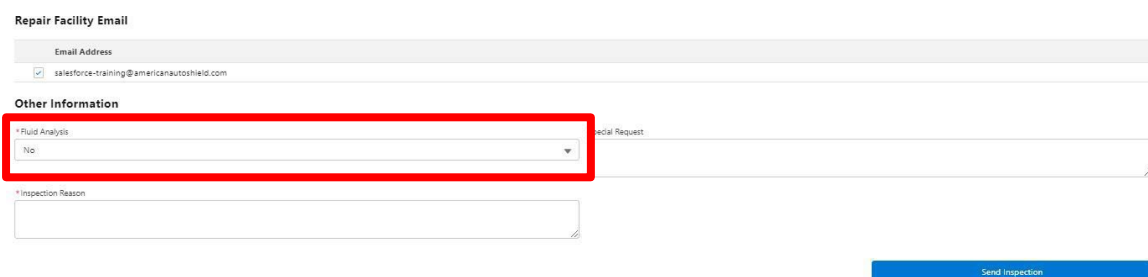
Repair Facility Email

Email Address: ☒ salesforce-training@americanautoshield.com

Other Information

* Fluid Analysis: Special Request:
 * Inspection Reason:

8. Next, determine if you will need fluid analysis done during the inspection. Potential reasons for this would be:
- Incorrect oil weight used
 - Improper type of transmission fluid used
 - Confirmation of foreign fluid or debris i.e.: water intrusion
9. Once you've determined the need for fluid analysis select "yes" or "no" from the **[Fluid Analysis]** dropdown box.



Repair Facility Email

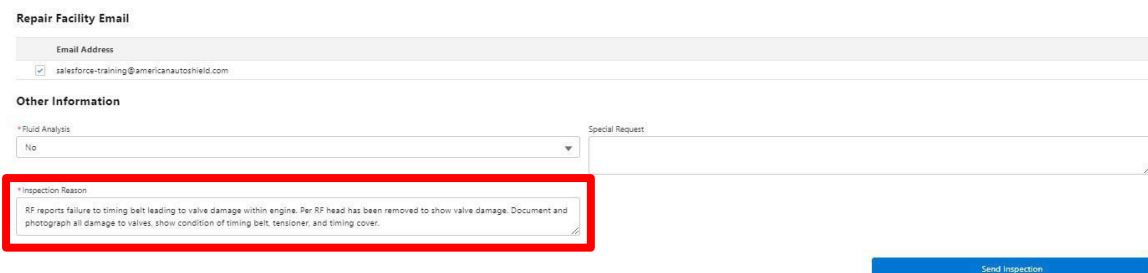
Email Address: ☒ salesforce-training@americanautoshield.com

Other Information

* Fluid Analysis: Special Request:
 * Inspection Reason:

[Send Inspection](#)

10. Now it's time to set the inspection reason. In the **[Inspection Reason]** field, ensure you document clearly and concisely exactly what you want the inspector to document.



Repair Facility Email

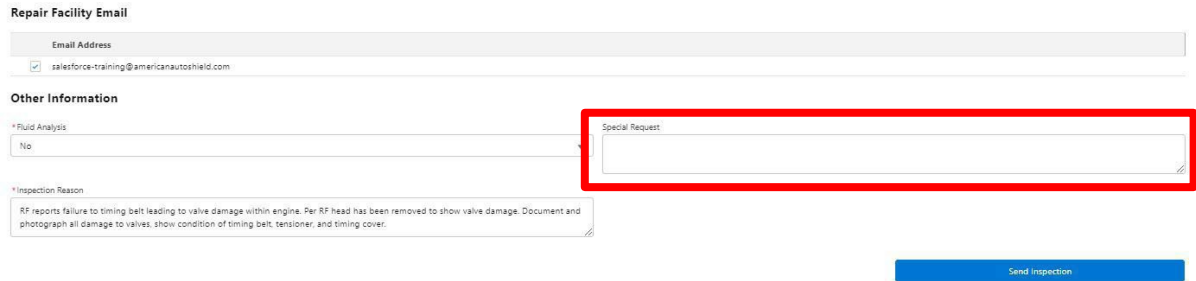
Email Address: ☒ salesforce-training@americanautoshield.com

Other Information

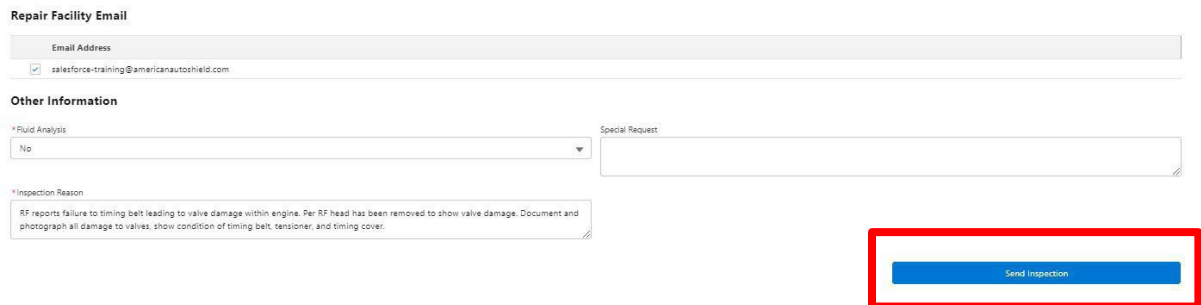
* Fluid Analysis: Special Request:
 * Inspection Reason: RF reports failure to timing belt leading to valve damage within engine. Per RF head has been removed to show valve damage. Document and photograph all damage to valves, show condition of timing belt, tensioner, and timing cover.

[Send Inspection](#)

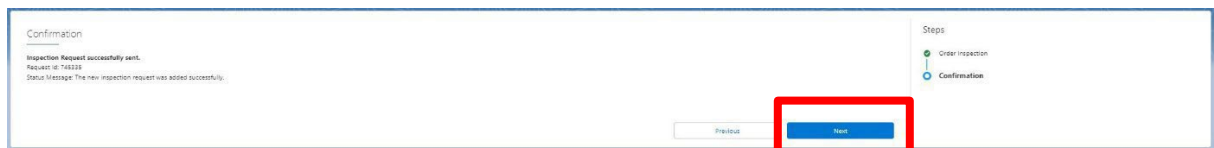
11. At this point, determine if there are any special requests. Examples would be:
 - a. Having the inspector call repair facility prior
 - b. Specific tools needed to demonstrate the failure.
 - c. Advising the inspector of complications
 - i. Vehicle on lift, vehicle outside, etc.
12. If needed, document any special requests in the corresponding **[Special Request]** field. If there are no special requests, leave this field blank.



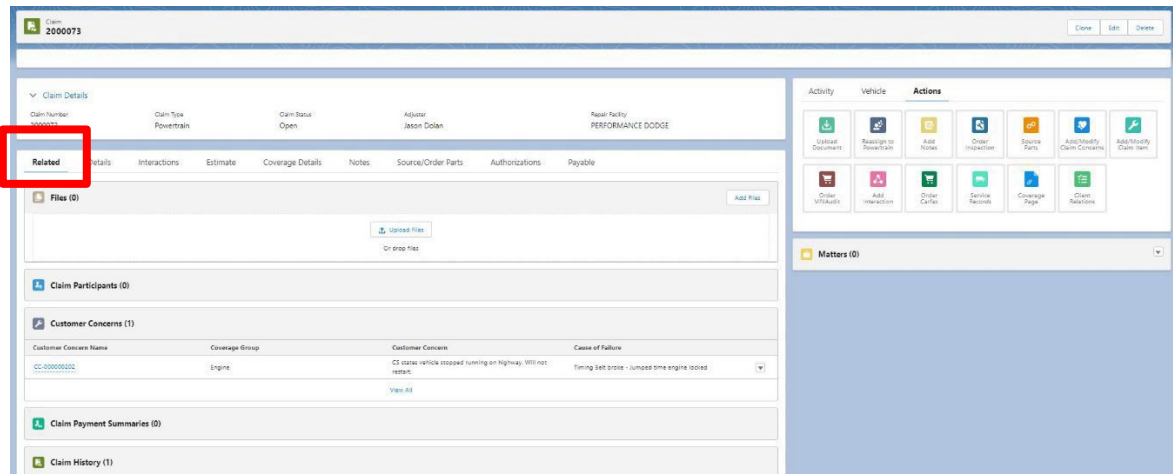
13. At this time, you're ready to set your inspection. Do so by selecting the **[Send Inspection]** button found in the bottom, right corner.



14. This will generate an email and send it to Southwest Inspections (SWIS). At this time, you will see the confirmation that the inspection was sent. Select **[Next]**



15. You can check the inspection by opening the **[Related]** tab of the claim.



16. Scroll down to the **[Inspection Items]** portion. You will see the “Claim Item Activity Status” for the Inspection as “Ordered”.

Inspection Items (1)			
Name	Claim Item Category	Claim Item Activity Status	Payee
Order Inspection - 745334	Claim Processing	Ordered	Southwest Inspections
View All			

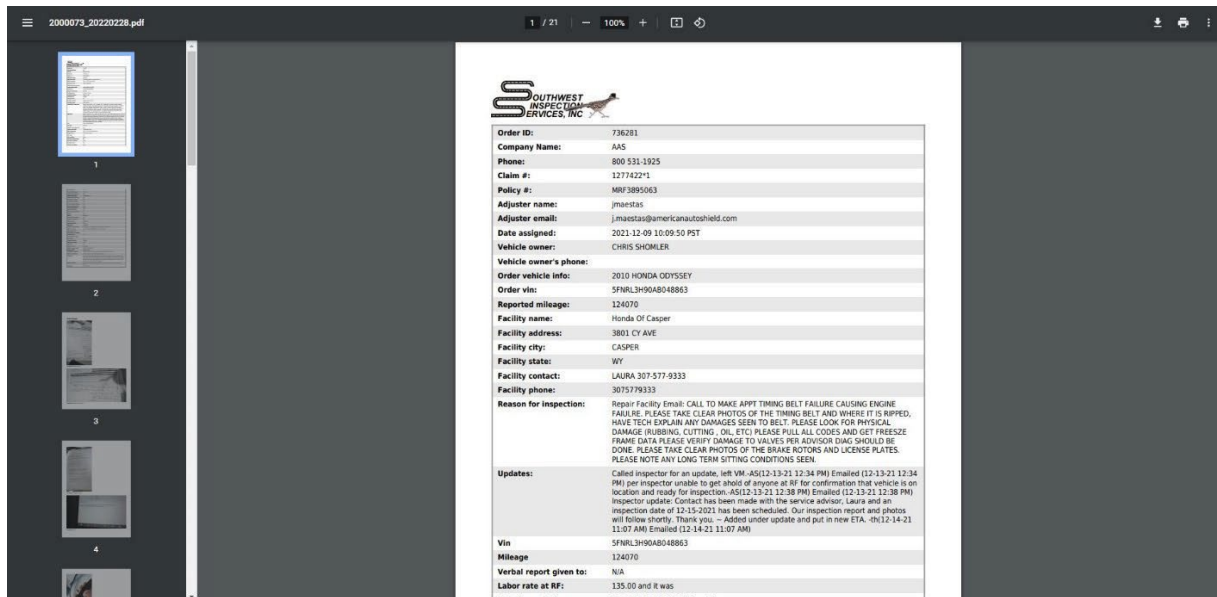
17. Upon receipt of a completed inspection, the inspection will be listed within the Inspection Received panel of your **[Claims Adjuster Dashboard]**

18. Select the Inspection ID number to view the returned inspection.

My Claims with Inspection Received				
Name ↑	Inspection Rea...	Inspection Request D...	Inspection Status Mess...	Claim Item Activity Sta
Inspection	-	-	-	Received
Inspection	-	-	-	Received
Inspection	-	-	-	Received
Inspection	-	-	-	Received
View Report (02.My Inspection Received)				

All Inspection Received				
Name ↑	Inspection Stat...	Inspection Reas...	Inspection Request D...	Inspection Status Messa...
Inspection	-	-	-	-
Inspection	-	-	-	-
Inspection	-	-	-	-
Inspection	-	-	-	-
Inspection	-	-	-	-
Inspection	-	-	-	-
View Report (02.All Inspection Received)				

19. At this time, you can review your inspection to document the information needed.

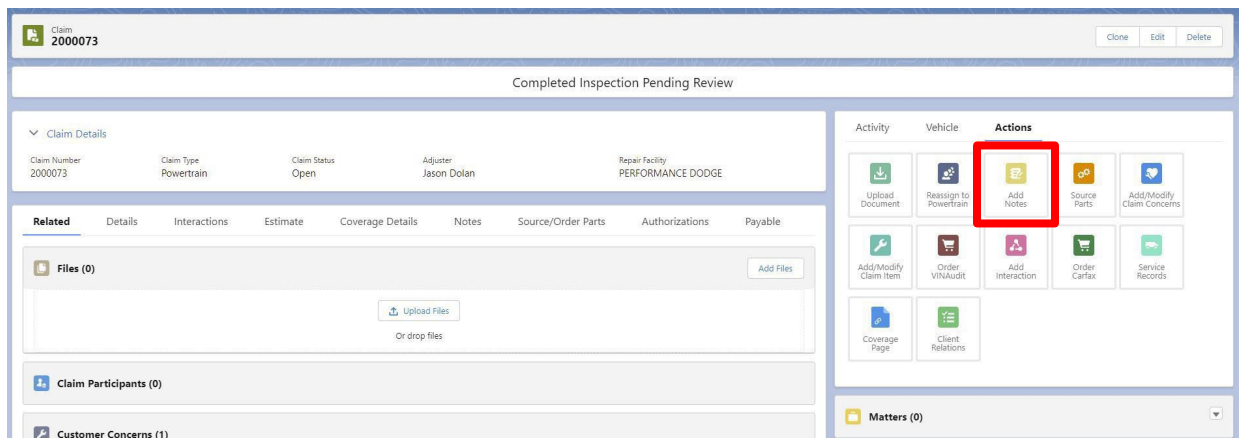


2000073_2020228.pdf

SOUTHWEST INSPECTION SERVICES, INC.

Order ID: 736281
 Company Name: AAS
 Phone: 800 531-1925
 Claim #: 1277422*1
 Policy #: M0F3895063
 Adjuster name: jmaestas
 Adjuster email: jmaestas@americanautoshield.com
 Date assigned: 2021-12-09 10:09:50 PST
 Vehicle owner: CHRIS SCHOMER
 Vehicle owner's phone: 2010 HONDA ODYSSEY
 Order vln: 5F9RL3H90A048863
 Reported mileage: 124070
 Facility name: Honda Of Casper
 Facility address: 3801 CY AVE
 Facility city: CASPER
 Facility state: WY
 Facility contact: LAURA 307-577-9333
 Facility phone: 3075779333
 Reason for inspection: Repair Facility Email: CALL TO MAKE APPY TIMING BELT FAILURE CAUSING ENGINE FAILURE. PLEASE TAKE CLEAR PHOTOS OF THE TIMING BELT AND WHERE IT IS RIPPED, HAVE TECH EXPLAIN ANY DAMAGES SEEN TO BELT. PLEASE LOOK FOR PHYSICAL DAMAGE (BURNING, CUTTING, OIL, ETC) PLEASE PULL ALL CODES AND GET FREEZE FRAME DATA PLEASE VERIFY DAMAGE TO VALVES PER ADVISOR DIAG SHOULD BE DONE. PLEASE TAKE CLEAR PHOTOS OF THE BRAKE ROTORS AND LICENSE PLATES. PLEASE NOTE ANY LONG TERM SITTING CONDITIONS SEEN.
 Updates: Called inspector for an update, ltr VM-AS(12-13-21 12:34 PM) Emailed (12-13-21 12:34 PM) per inspector unable to get photo of anyone at R for confirmation that vehicle is on location and ready for inspection. ASI(12-13-21 12:38 PM) Emailed (12-13-21 12:38 PM) Inspector update: Contact has been made with the service advisor, Laura and an inspection date of 12-15-2021 has been scheduled. Our inspection report and photos will follow shortly. Thank you. - Added under update and put in new ETA. - (12-14-21 11:07 AM) Emailed (12-14-21 11:07 AM)
 Vin: 5F9RL3H90A048863
 Mileage: 124070
 Verbal report given to: N/A
 Labor rate at RF: 135.00 and it was

20. Now you'll need to generate a review note, to do so select the **[Add Notes]** button under the actions tab of your claim.



Claim 2000073

Completed Inspection Pending Review

Claim Details

Claim Number: 2000073 | Claim Type: Powertrain | Claim Status: Open | Adjuster: Jason Dolan | Repair Facility: PERFORMANCE DODGE

Related: Details | Interactions | Estimate | Coverage Details | **Notes** | Source/Order Parts | Authorizations | Payable

Files (0)

Upload Files

Or drop files

Claim Participants (0)

Customer Concerns (1)

Activity | Vehicle | **Actions**

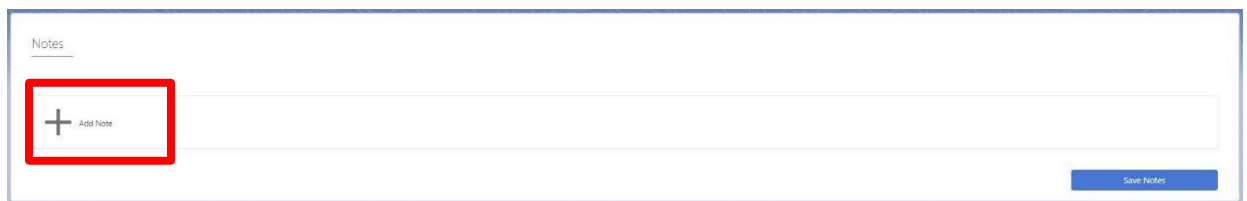
Upload Document | Reassign to Powertrain | **Add Notes** | Source Parts | Add/Modify Claim Concerns

Add/Modify Claim Item | Order VIN Audit | Add Interaction | Order Carfax | Service Records

Coverage Page | Client Relations

Matters (0)

21. This will then bring up the **[Add Notes]** tab, select the + sign next to Add Note.



Notes

+ Add Note

Save Notes

22. Doing so will generate the note entry field. Select **[Inspection Review]** from the dropdown on the right and write your review in the note field. Once complete select **[Save]**.



Notes

Inspection Reviewed

Per inspection review, timing belt confirmed broken; no signs of lack of maint, as was replaced 20k miles ago. No signs of external influence. Per photos does not appear engine replacement is in order, should be able to resolve with cylinder head repair and timing belt replacement.

Cancel Save

Save Notes

23. Once saved you will see the note posted in your Notes window. Select **[Save]**



Notes

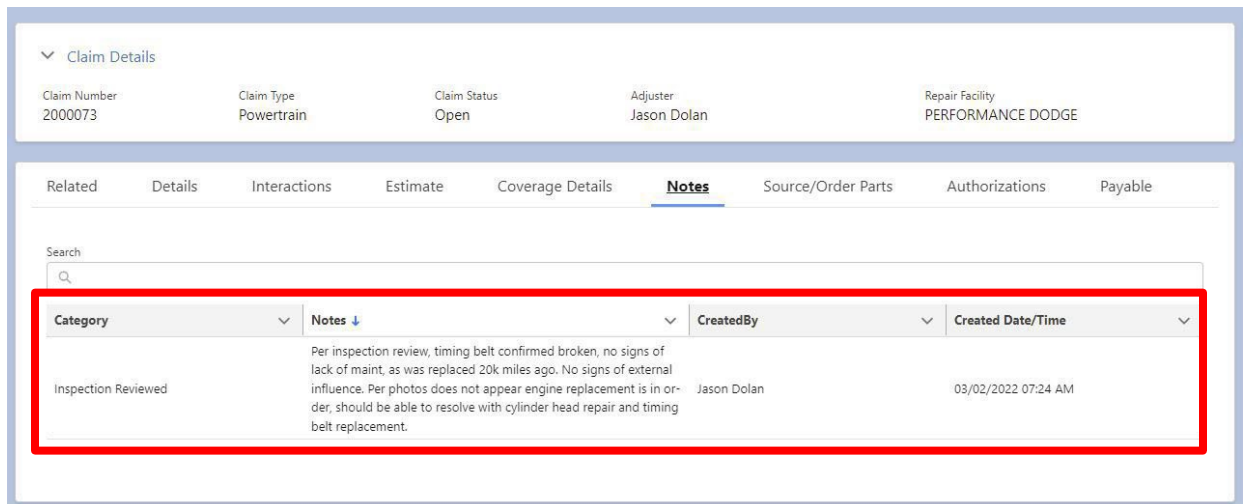
Inspection Reviewed

Per inspection review, timing belt confirmed broken; no signs of lack of maint, as was replaced 20k miles ago. No signs of external influence. Per photos does not appear engine replacement is in order, should be able to res...

+ Add Note

Save Notes

24. At this point you will see your note posted to the claim by selecting the **[Notes]** tab.



Claim Details

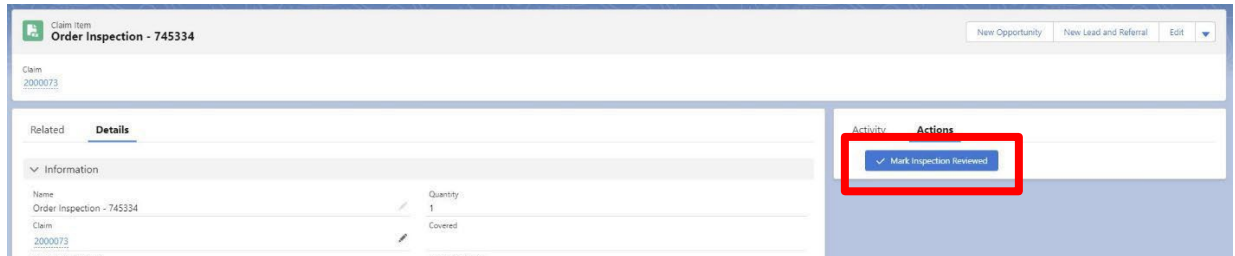
Claim Number: 2000073 Claim Type: Powertrain Claim Status: Open Adjuster: Jason Dolan Repair Facility: PERFORMANCE DODGE

Related Details Interactions Estimate Coverage Details **Notes** Source/Order Parts Authorizations Payable

Search

Category	Notes	CreatedBy	Created Date/Time
Inspection Reviewed	Per inspection review, timing belt confirmed broken; no signs of lack of maint, as was replaced 20k miles ago. No signs of external influence. Per photos does not appear engine replacement is in order, should be able to resolve with cylinder head repair and timing belt replacement.	Jason Dolan	03/02/2022 07:24 AM

25. To finalize, you'll need to mark your inspection as reviewed. Select the **[Mark Inspection Reviewed]** button on the **[Order Inspection]** screen.



26. Afterwards, your inspection will reflect as reviewed on the claim front screen.

Inspection Items (1)			
Name	Claim Item Category	Claim Item Activity Status	Payee
Order Inspection - 745334	Claim Processing	Reviewed	Southwest Inspections
View All			

Approval & Revision

Date Created 2/25/2022	Created By Johnnie Martinez		Date Approved 2/28/2022	Approved By Jason Dolan
Date Revised 4/21/2022	Revised by Johnnie Martinez	Revision Description Update screenshot	Date Approved 4/22/2022	Approved By Jason Dolan
Date Revised 08/02/2023	Revised by Melissa Bryant	Revision Description Add Fast Track Article	Date Approved 08/02/2023	Approved By Amanda Wiseman
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]